

Chapter 10

Civilian Inbox

Chapter Overview

Introduction

This chapter introduces you to the Civilian Inbox, and explains how personnelists, as well as managers and supervisors, will access their personal inboxes to process actions. DoD has customized the Oracle HR Workflow Inbox to allow additional data fields and renamed it the Civilian Inbox. The Civilian Inbox has 26 columns.



Note: Workflow Inbox will remain on the **Navigation List** for the present time, but it will not be used by DoD.

Chapter Contents

Topic	Page
Civilian Inbox	1
Accessing the Civilian Inbox	3
Buttons and Boxes on the Notifications Summary Window	5
Fields and Boxes on the Notifications Window	6
Civilian Inbox Column Titles	7
Customizing the Civilian Inbox	10
Creating a Folder	12
Querying for a Folder	13
Customizing the Columns	14
Sorting the Columns	14
Viewing Closed Actions	15

See Also



Module 1, Fundamentals of the Modern DCPDS
 Chapter 7, Folders
 Sorting the Order of Data in a Folder
 Customizing the Display of Data in a Folder

Continued on next page

Chapter Overview, Continued

How It Works

In most cases, the Request for Personnel Action (RPA) and the Training Request Form (TRF), in Oracle Training Administration (OTA), will be initiated by managers/supervisors, personnelist, and other designated users.


From the Civilian Inbox, you can:

- Query and view all notifications, to include closed actions.
- Query and view notifications by specific criteria; e.g., date sent, subject, status, and due date.
- View Routing and Action History.
- Respond to an action.
- Re-route the action to another user.
- Print the RPA, Notification of Personnel Action (NPA), and the TRF.
- Delete an RPA or TRF from your personal inbox.

You can customize your inbox to better suit your specific needs by changing the order and size of the columns, as well as hiding those you do not use.

Civilian Inbox

Before You Begin

1. Once an action has processed, you must refresh the window [F8] to clear it from your inbox.
 2. You can delete an RPA or OTA action from your inbox by clicking **<Respond>** then clicking the Delete Record button on the Toolbar .
 3. The Message Line at the bottom of the inbox tells you how many actions you have, i.e., Count *4.
 4. The Workflow Inbox will remain on the **Navigation List** as an Oracle HR menu selection but will not be used by DoD.
 5. You must be in a trainer role (administrator, manager, OTA personnelist, etc.) before you can process OTA actions in the Civilian Inbox. See Module 7, Employee Training and Development Using the Modern DCPDS.
-

Accessing the Civilian Inbox

Step	Action
1	Navigation List → <i>Civilian Inbox</i> → <Open> .
2	The Civilian Inbox Window displays. It is also known as the Notifications Summary Window.
3	To access an action, use your scroll bar on the left side of the Notifications Summary Window to move the <i>Current Record Indicator</i> to the action you need to process. The Message Area of the Civilian Inbox displays pertinent information about the action. Use your right scroll bar to view the information. Click either <Open> or <Respond> to open the action. Note: The Civilian Inbox may contain RPAs and TRFs based on your role. To open a TRF, you must be using your OTA responsibility.

Continued on next page

Civilian Inbox, Continued

Illustration of Civilian Inbox

Date Sent	Subject	To	Com
01-DEC-1999 16:01:47	CAO/TRANSFER Request Notification : Andy-Smith	CAO/Transfer	
29-NOV-1999 15:42:19	RPA : Pay Adj : Req# 99NOVCPMS-CH-002738	Carla Hansen	
20-NOV-1999 08:36:21	Error : WGI for NULL, Mr. OCCUPIED TEST : Req # WGI:8139	Work Flow Admin	
15-NOV-1999 15:28:47	Error : WGI for CAOANGEL, DTAAAAA : Req # WGI:7754	Work Flow Admin	
15-NOV-1999 15:26:32	RPA : Correction : Req# 99NOVCPMS-CH-002667	Carla Hansen	
15-NOV-1999 14:58:04	Update HR Complete : RPA : Promotion : Req# 99NOVCPMS-CH-002666	Carla Hansen	
15-NOV-1999 09:44:49	RPA : Reassignment : Req# 99NOVCPMS-CH-002663	Carla Hansen	
23-OCT-1999 08:35:00	Error : WGI for Smith, Robert : Req # WGI:7753	Work Flow Admin	
23-OCT-1999 08:34:48	Error : WGI for Nissan, Mrs. Maxima : Req # WGI:7751	Work Flow Admin	
23-OCT-1999 08:33:49	Error : WGI for Kundavaram, Ms. Geeta Reddy : Req # WGI:7742	Work Flow Admin	

Message

CAO/TRANSFER Request has been received for Andy-Smith.
You may process your Request for Personnel Action.

Close Open

Illustration of an OTA Inbox

Subject	Status	Date Sent	Comment
Training Request Awaiting Approval	Open	08-DEC-1999 11:01:51	This is priority training
Training Request Awaiting Approval	Open	08-DEC-1999 11:23:45	It is imperative this trai
Training Request Awaiting Approval	Open	08-DEC-1999 15:46:36	

Message


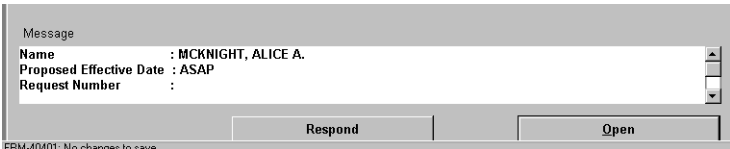


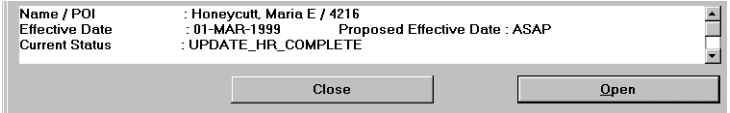

Training Request is requiring your approval.
Employee Name: Kolstad, Stephanie A

Respond Open

Continued on next page

Civilian Inbox, Continued

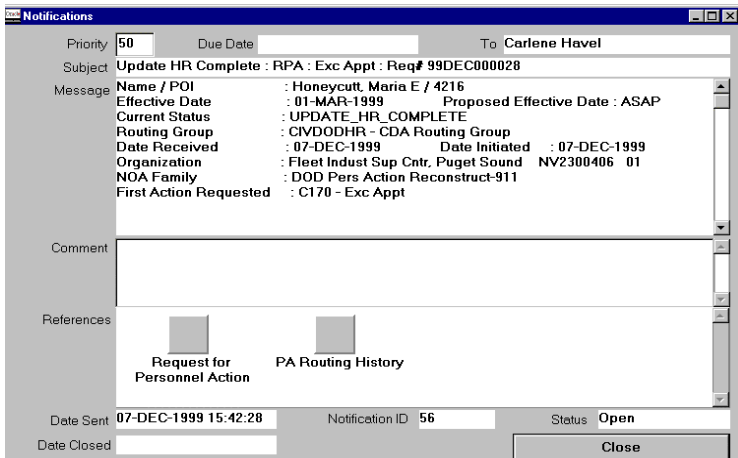
Buttons and Boxes on the Notifications Summary Window

Buttons and Boxes	Description/Function
 Folder	Click to display a listing of Inbox folders available to you. Click <OK> to display the new folder and its contents in the Notifications Window.
<input checked="" type="checkbox"/> Query <u>Only</u> Open Notifications Query Only Open Notifications Checkbox	Displays all open actions when selected. Deselect the “X” in order to display closed actions.
Message Block	<p>Displays the highlighted action. Use the right scroll bar to read the entire message.</p> 
 Respond	Click to open the RPA or the TRF to take further action and route or approve. This Taskflow Button displays at the bottom of the inbox when the record indicator is next to an “Open” action.
 Close	<p>Click to take the action out of the Inbox and put it in History. You can review if you deselect the Query Only Open Notifications checkbox. <Close> displays at the bottom of the inbox instead of <Respond> when an action is completed.</p> 
 Open	Click to open the Notifications Window for a review of the action. Clicking <Respond> opens the RPA or the TRF to take further action and route.

Continued on next page

Civilian Inbox, Continued

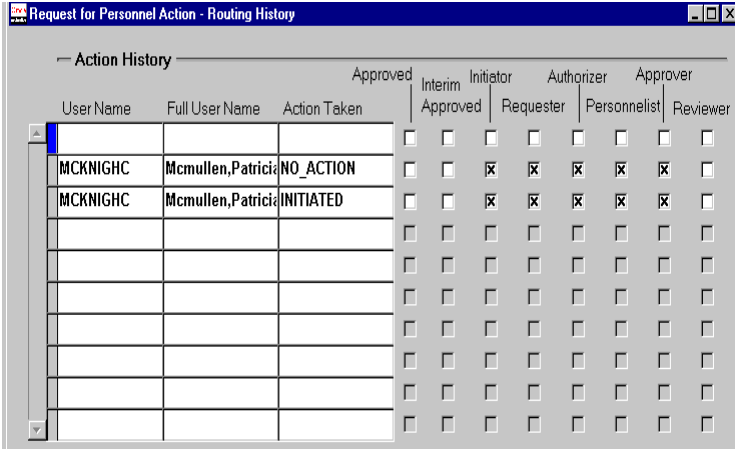
Fields and Boxes on the Notifications Window

Fields and Boxes	Description/Function
Data Fields	<p>The first four data fields reflect the Inbox fields.</p>  <p>The screenshot shows a 'Notifications' window with the following fields and values:</p> <ul style="list-style-type: none"> Priority: 50 Due Date: (empty) To: Carlene Havel Subject: Update HR Complete : RPA : Exc Appt : Req# 99DEC000028 Message: <ul style="list-style-type: none"> Name / POI : Honeycutt, Maria E / 4216 Effective Date : 01-MAR-1999 Proposed Effective Date : ASAP Current Status : UPDATE_HR_COMPLETE Routing Group : CIVDODHR - CDA Routing Group Date Received : 07-DEC-1999 Date Initiated : 07-DEC-1999 Organization : Fleet Indust Sup Cntr, Puget Sound NV2300406 01 NOA Family : DOD Pers Action Reconstruct-911 First Action Requested : C170 - Exc Appt Comment: (empty text area) References: <ul style="list-style-type: none"> Request for Personnel Action PA Routing History Date Sent: 07-DEC-1999 15:42:28 Notification ID: 56 Status: Open Date Closed: (empty) Close button
Message	The Message block provides information from the personnel action.
Comment	You can type notes in the Comment block for yourself or other Groupbox members and click Save. Your comments display in the respective column in the Inbox but do not display when you route the action.

Continued on next page

Civilian Inbox, Continued

Fields and Boxes on the Notifications Window (continued)

Fields and Boxes	Description/Function
References	<p>The Request for Personnel Action and the PA Routing History buttons display. Clicking the Request for Personnel Action opens it. Clicking the PA Routing History displays the Action History.</p> 
Fields	The four remaining data fields match the Inbox columns.
Close or Respond	Click <Close> to close the Notifications Window and return to your Inbox. Click <Respond> to open the RPA.

Civilian Inbox Column Titles

The **Civilian Inbox** has twenty-six columns. The first nine columns are the same for both the RPA and OTA. Use your scroll bar located beneath the columns to move left or right to view the column headings and information. The columns can be customized as discussed in the Folder Tools section of this chapter.



Note: Columns with an asterisk can be sorted. Your region may set up default names for the columns, which may give you a slightly different view of the Inbox.

Continued on next page

Civilian Inbox, Continued

Civilian Inbox Column Titles (continued)

RPA Column Title	Description/Function
1. *Priority	A system-generated number.
2. *Subject	Information about the action in the Civilian Inbox.
3. *To	Lists the name of your Groupbox, Routing List, or Person the action was routed to.
4. *Date Sent	Date action was submitted to your Inbox.
5. *Due Date	System-generated.
6. *Comment	Information you can add about the action.
7. *Date Closed	Date you closed the action.
8. *Notification ID	System generated number.
9. *Status	Describes the workflow designation of each action: <ul style="list-style-type: none"> • <i>Open</i> – currently in the routing or processing stage • <i>Canceled</i> – processed action • <i>Closed</i> – updated to the database
10. First NOA Code	Retrieved from the originator's RPA.
11. Second NOA Code	Retrieved from the originator's RPA.
12. First NOA Description	Retrieved from the originator's RPA.
13. Second NOA Description	Retrieved from the originator's RPA.
14. SF52 Effective Date	Retrieved from the originator's RPA.
15. Employee Name	Retrieved from the originator's RPA.
16. NOA Family	Retrieved from the originator's RPA.
17. Request Number	Retrieved from the originator's RPA.
18. Organization	Retrieved from the "To" in position.

Continued on next page

Civilian Inbox, Continued


Civilian Inbox Column Titles (continued)

RPA Column Title	Description/Function
19. Date Received	Date received in the Region.
20. Pay Plan	Retrieved from the originator's RPA.
21. Occ Series	Retrieved from the originator's RPA.
22. Step or Rate	Retrieved from the originator's RPA.
23. Prop Eff Date	Retrieved from the originator's RPA.
24. Notepad	Yes/No - Indicates if there is an entry on the notepad located on the RPA.
25. COREDOC	Yes/No - Indicates if a Core Document is attached to the RPA. You can access by clicking <Others>.
26. Resumix	Yes/No - Indicates if a Resumix Requisition has been initiated.



Continued on next page

Civilian Inbox, Continued

Customizing the Civilian Inbox

The Menu Bar for the **Civilian Inbox** contains a **Folder**  button which displays the **Folder Tools** Window or Palette that enables you to customize your data fields. You can keep the Palette open while you are in a folder.













Folder Tool	Description/Function
 Folder	Displays a listing of Inbox folders available to you. Click the folder you want to access, click <OK> to display the folder and its contents in the Civilian Inbox Window.
 Save	Saves any changes you have made to the Civilian Inbox .

Continued on next page

Civilian Inbox, Continued

Customizing the Civilian Inbox (continued)

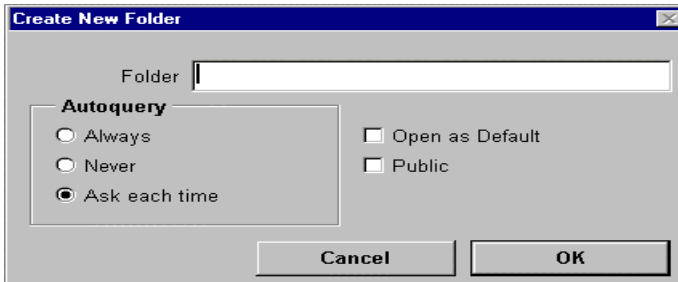
Folder Tool	Description/Function
 Create New Folder	Displays a New Folder dialog box to create a new folder group for your Civilian Inbox .
 Delete	Displays a Delete Folder dialog box with a list of all folders you can delete from your Civilian Inbox .
 Widen	Increases the width of a column in the Civilian Inbox Window. You must have your cursor in the column that you want to increase in size.
 Shrink	Decreases the width of a column in the Civilian Inbox Window. You must have your cursor in the column that you want to decrease in size.
 Show Field	Displays additional fields. You must have your cursor in the column that you wish to show any additional or hidden fields.
 Hide Field	Hides a column. You must have your cursor in the column that you wish to hide. To see a hidden column, click "Show Field".
 Move Left	Moves the column to the left of an adjoining column. You must have your cursor in the column that you wish to move left.
 Move Right	Moves the column to the right of the adjoining column. You must have your cursor in the column that you wish to move right.
 Move Up	This function is not available in the Civilian Inbox.
 Move Down	This function is not available in the Civilian Inbox.

Continued on next page

Civilian Inbox, Continued

Creating a Folder

You can create and save new folder definitions or open and delete existing folder definitions. When you open a new folder definition, the layout for the new folder definition replaces the layout for the current folder definition.

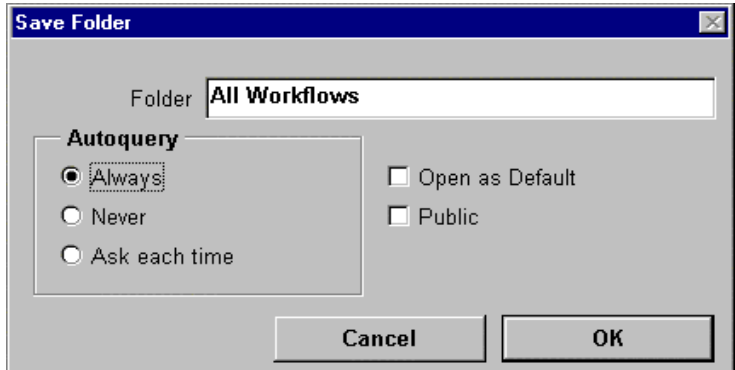

Step	Action
1	With the Civilian Inbox Window open, click Folder on the Main Menu Bar and click New or click the Create New Folder button on the Folders Tool Palette on the Toolbar.
2	<p>The Create New Folder Window displays. Type in a new and unique folder name in the <i>Folder</i> data field.</p> 
3	<p>Click one of the three Autoquery buttons:</p> <ul style="list-style-type: none"> • Always – the folder automatically retrieves the actions that meet your query criteria • Never – contents of the folder display; you will need to query each time • Ask each time – a popup up window displays asking if you want to display the contents of the folder
4	<p>Select the Open as Default checkbox if you want this specific folder definition to open as your default each time you navigate to this folder for the first time.</p> <p><i>Or</i></p> <p>Select the Public checkbox if you want other users to have access to this folder definition.</p>
5	Click <OK> . The name of the new folder definition displays in the upper left corner of the folder window.

Continued on next page

Civilian Inbox, Continued

Querying for a Folder

You can define and alter the query criteria for any folder and save those criteria in a folder definition.

Step	Action
1	With the Civilian Inbox Window open, run the query that you want by using Query Find on the Main Menu Bar or F8. At least one record must be retrieved for the folder to memorize the query.
2	Click Folder on the Main Menu Bar then click Save As , if you want to save this query criteria in a folder definition.
3	The Save Folder Window displays. Type in a new name in the Folder data field. 
4	Click the Always button in the Autoquery region and check Open as Default, if you want this as your Default Folder.  Note: Unless you want this as your Default folder (you can only have one) do not select either of the checkboxes.
5	Click <OK> . Return to your new inbox.

Continued on next page

Civilian Inbox, Continued

Customizing the Columns

Step	Action
1	With your Civilian Inbox Window open, click on the Folder button.
2	With your cursor in the column you want to change, perform one of the following actions: <ul style="list-style-type: none"> • Click the Move Left or Move Right arrows to move your columns to the left or to the right. • Click the Hide Field button to delete a column, which removes it from view but does NOT permanently delete it. Click the Show Field button to view it again. • Click the Widen Field and the Shrink Field buttons to expand or reduce the width of a column.
3	Click Save on the Toolbar.

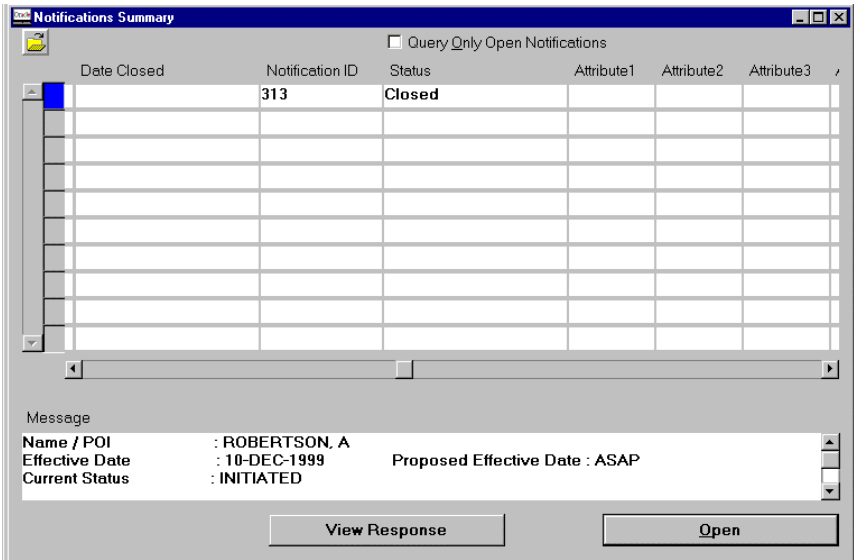
Sorting the Columns Refer to the **Column Titles** earlier in this procedure for the ones, which can be sorted (indicated by asterisk).

Step	Action
1	Navigate to your folder. Reposition the columns you want in the first three positions (to be sorted) by using the Move Left and Move Right arrows.
2	Click Folder on the Main Menu Bar then click Show Order By. The Order by Buttons display below the first three columns. Each Order by button acts as a toggle to switch the way data in the corresponding field is sorted: <ul style="list-style-type: none"> • Ascending. • Descending. • No Ordering.
3	Click each Order by Button to set the column in ascending, descending, or no order.
4	Click Save on the Toolbar.

Continued on next page

Civilian Inbox, Continued

Viewing Closed Actions

Step	Action
1	With your Civilian Inbox Window open, deselect the Query <u>O</u> nly Open Notifications Checkbox at the top of the window.
2	<p>The Taskflow Buttons at the bottom are now changed to <View Response> and <Open>.</p> 
3	Click < View Response > to review the RPA or click < Open > to view the Notifications Window which shows the status field as “Closed”. Click < View Response > at the bottom to then view the RPA.
4	Close the windows and return to your Civilian Inbox . Select the Query Only Open Notifications, if you no longer want to review closed actions.

THIS PAGE LEFT INTENTIONALLY BLANK